

Send a Statement of Account

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CST

The Statement of Account lists a payer's current unpaid and paid invoices, any payments made, and any relevant notes. It also includes the total billed, total paid, and total account balance. You can email this report directly to payer contacts.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to add a contact.
4. From the **Contacts** section to the left, click the contact to whom to send the report.
5. Click the **Actions** drop-down menu and select **Send Statement of Account**.

The screenshot shows a 'Contact Details' form. On the left, there are input fields for Name (John Mixer), Phone (Home (817) 456-7891), Email (jmixer@email.com), and Billing Address (555 A Street, Los Angeles, CA 90210). On the right, there are 'Contact Attributes' (Role: Guardian, checkboxes for 'Payer of invoices for child care' and 'Authorized to pickup child'), 'Notifications', and 'Language' (English). An 'Actions' dropdown menu is open, showing 'Welcome Email' and 'Statement of Account'. At the bottom are 'Remove' and 'Save' buttons. A footer note says 'Contact details are for Accounting only.'